

## Volunteer Return Preparation Program Attributes of Model VITA Site

**The model VITA site has the following attributes:**

### **Site Preparation:**

- Locates/secures site locations
- Locates/secures equipment and supplies
- Provides computer support
- Prepares and submits Form 8633, when required
- Installs/maintains hardware/software
- Ensures data communication lines are available
- Schedules site dates and times
- Ensures sites are open and provide services as advertised

### **Volunteers:**

- Develops a recruitment method to attract potential volunteers
- Works with Recruitment /Publicity Specialist to acquire volunteers
- Maintains a list of volunteers
- Provides instructors for all training
- Provides all phase of classroom training, electronic file training and certification, Form 13615
- Signs and submits Privacy and Confidentiality agreement, Pub. 4299
- Grades tests and submits names and dates of certified volunteers, via Form 13206 to appropriate parties
- Ensure volunteers sign and submit Form 13615, Volunteer Standards of Conduct
- Schedules volunteers to work at sites

### **Tax Return Preparation:**

- Excludes service to no one because of race, color, sex, age, national origin, or disability
- Ensures customers log/check in and complete customer information sheet
- Ensures volunteers only prepare returns within their scope
- Ensures referrals are made to Tax Professionals for complex tax return assistance
- Ensures volunteers are aware of and are applying correct interviewing techniques
- Ensures the use of reference materials and job aids
- Provides a quality review process at the site
- Ensures returns are electronically filed when appropriate and transmitted within 72 hours
- Ensures a copy of return is provided to the customer in Pub. 730 (or equivalent)
- Monitors site coverage and traffic
- Ensures no compensation or donation is accepted
- Safeguards equipment and documents from damage or theft
- Safeguards and protects the EFIN
- Ensures the Site Identification Number is entered correctly on returns and on Forms 8453
- Ensures customer is advised of why personal information will be retained and secures signature on appropriate documents
- Ensures Forms 8453 are submitted to appropriate Submission Processing Center within 72 hours
- Ensures all issues regarding electronic filing rejects are resolved timely
- Uses site visitation report, Form 6729 to monitor sites adherence to regulations
- Maintains positive working relationship with SPEC Territory office

\*\* Detailed information regarding each attribute is found within Publications 1084, 1345, 1345A and 3189